

## **America Saves Conference Call – December 7, 2010**

### **Attendees:**

Ann House – Utah Saves  
Tressa Haderlie – Utah Saves  
Preston Cochrane – AAA Fair Credit Foundation  
Jennifer Hunter – Kentucky  
Linda Saunders - Newark  
June Puett - Tennessee  
Isaac Chappell - Alabama  
Jim Terry – Washington DC  
Elaine Courtney - Florida  
Rebecca Haynes Bordas - Indianapolis  
Betsy - Ohio  
Becky - Mississippi  
Sarah Cooper – CFA  
Liz Gorham – South Dakota

### **1. Partnerships**

- Jim: Military Saves has contacted him with the idea of being a partner. A letter regarding the positive aspects of partnering with Military Saves can be created to push this along.
- Liz: Interested in partnering with Banks across South Dakota. Sarah from State Bank is working on creating an outline on why it would be good to form coalitions with banks and other programs. This piece can be used to promote partnerships.
- Ann: Credit Unions could be some possible organization that would be willing to work with local saves campaigns.

### **2. Saves Campaigns in Educational Programs**

- Becky: Recognizes that it's hard to get people to sign up for programs so she has sign ups at her tax assistant sites with her and gives them to her clients to fill out as she helps prepare their taxes. She takes these with her to all the sites throughout Missouri. Also, using gift certificates and other incentives has worked for her.
- Elaine: Uses a "Saves" message in her programs and uses enrollment forms to enter people into drawings for giveaways.
- Rebecca: Places posters and flyers at sites and trains the tax site volunteers on how to explain the Take \$200 campaign and the Saves Campaign. Getting community leaders involved has helped as well.
- Ann: Brings the enrollment forms with her when she teaches classes and puts a form and a pen on everyone's desk so they can fill them out during the class. She also includes information during her class.
- Incentives have been working well: Piggy Banks, Pens, Magnets, Calculators.

- Sarah: The mini grants have gone through! Amounts for these grants will be between \$700 and \$1200. The proposals are due by January 7<sup>th</sup>. The funds will be dispersed within the month of January. An outline for the proposal will be sent out and posted on the site.

### **3. Tax Season Resources**

- Information about EITC can be found on eXtension.org as well as eitcplatform.org. Also information about savings bonds can be found on the IRS site and America Saves Week site.
- Information on saving and spending tax refunds was sent out by Jim.

### **4. Campaign Newsletters and Social Marketing**

- Ann: We send out a newsletter at the beginning of every month to Utah Savers to provide them with more information (also works as an incentive for people to enroll). This helps to continually provide them with useful information. They can be access at [utahsaves.org](http://utahsaves.org). These newsletters are created and sent out using Constant Contact. [www.constantcontact.com](http://www.constantcontact.com)
- Facebook, Blog, and Twitter are used to provide information to people in the campaign areas as well.

### **5. Other topics**

- Becky: West Virginia Saves created a proposal that was accepted by the National Urban Extension Conference. Information on the Saves program will be presented at that conference.
- In order to continue receiving newsletters from America Saves, you have to update enrollment. Let Sarah know if you have savers who want to continue to have the newsletter mailed to them.

### **6. Final Comments**

Next meeting on Jan. 11 hosted by Isaac will include a webinar with information about the 2011 America Saves Week. More information will be sent out in a reminder email.